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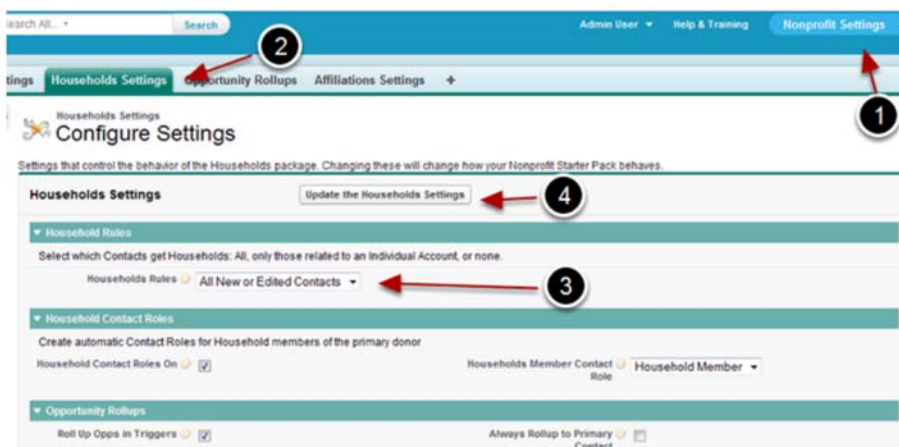
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NPSP: Creating Households for Contacts without Hous

When using the new rollups, it's required that each contact have a Household record associated with them. If you haven't been using Households, we can automatically have Salesforce add Households for us by using the Data Loader. (Developer's Note: The household creation code automatically checks for the existence of a household when an update is triggered on a contact using these settings. By using the Data Loader, we can cause an update to fire on each contact, without changing existing data, and have the trigger and class it calls create the households for us.)

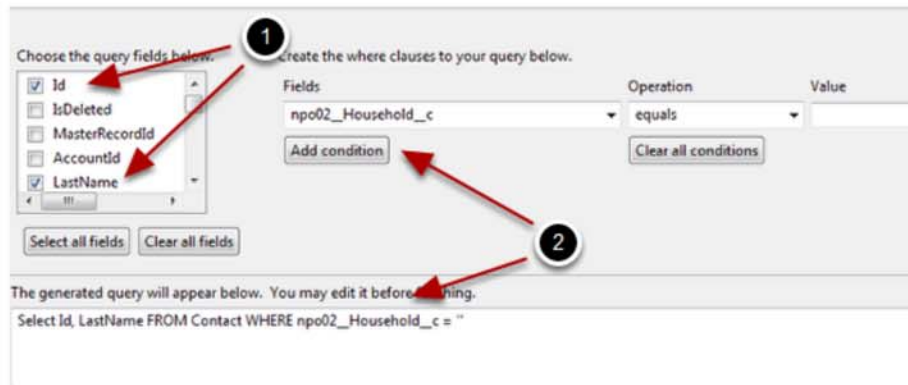
Configure Settings



Our first step is to configure the settings for the Households. (1) Select 'Nonprofit Settings', then (2) Click on the 'Household Settings' tab. (3) Select the Household Rules as 'All New or Edited Contacts' This is adjustable if we

later want to change the setting. Finally, (4) Click 'Update the Households Settings'.

Export Existing Contacts Without Households



Choose the query fields below.

Create the where clauses to your query below.

Fields	Operation	Value
np02__Household__c	equals	

The generated query will appear below. You may edit it before running.

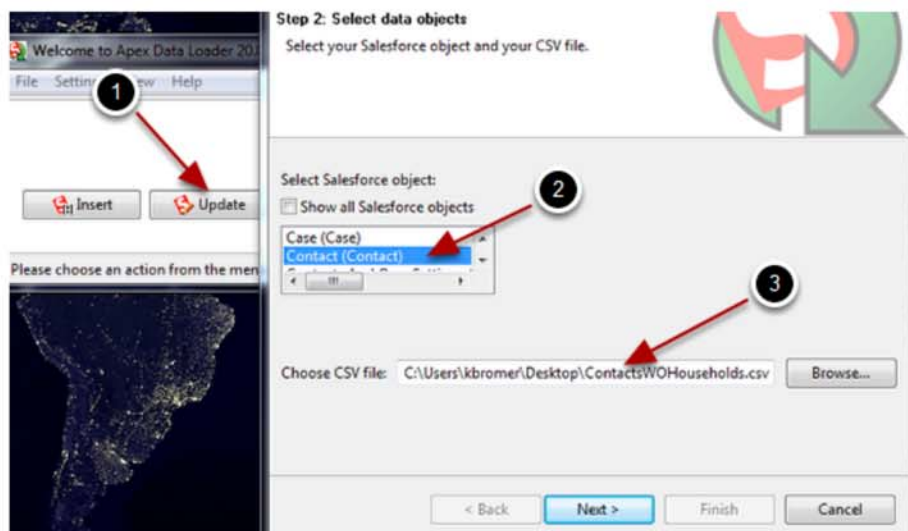
Select Id, LastName FROM Contact WHERE np02__Household__c = ''

Setup your Data Loader for 'Export', with 'Contacts' as the object to export. (1) Select the ID and LastName fields from the 'Contact' object. (2) Use the condition WHERE np02__Household__c = "" to exclude contacts who already have existing households. Export the data to your desktop.

(For additional assistance configuring the Data Loader, please see "Downloading and Configuring the Apex Data Loader" in this manual. Step-by-step instructions for exporting can be found under "Exporting Data with the Apex Data Loader")

(Developer's Note: We use LastName since it's a required field for the contact object.)

Update Contacts - Select Object and Record



Step 2: Select data objects

Select your Salesforce object and your CSV file.

Select Salesforce object:

Show all Salesforce objects

Case (Case)

Contact (Contact)

Choose CSV file: C:\Users\kbromer\Desktop\ContactsWOHouseholds.csv

Next >

(1) Select 'Update' in your Data Loader. (2) Select 'Contact' as the update object. (3) Choose the file you exported in the previous step. Click 'Next'.

Update Contacts - Map Fields

Choose an Existing Map **Create or Edit a Map** 1

Current Field Mapping:

File Column Header	Name
ID	Id
LASTNAME	LastName

2

3

< Back **Next >** Finish Cancel

(1) Create or Edit a Map, and (2) map the Id field and the LastName field. Click 'Next' and complete the update process.

Confirm Your Data

Contact Detail Edit Delete Clone Sharing Request Update New Household

▼ Contact Details

Name	George Jetson
Organization Name	George Jetson
Title	
Contact Owner	Admin User (Change)
Birthdate	
Household	Jetson Household

1

Check that your exported contacts without households now have a new household assigned to them.



(/_ui/core/userprofile/UserProfilePage?u=00580000003egB0AAI) Contribution by Kevin Bial State, Alice 2.0 User profile
/UserProfilePage?u=00580000003egB0AAI)
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